SedonaOffice - 6.2.0.5 - 3/9/2022

01/05/2024 4:51 pm EST

Special Upgrade / Install Instructions

If upgrading from a SedonaOffice version prior to 6.0, the following related updates are also required:

FSU Updates - iOS devices must be on iOS version 11 or newer. Please also check the app store for any updates to your FSU app

SedonaWeb - If your company uses SedonaWeb, IT will update your SedonaWeb version at the same time as your SedonaOffice version. This is to ensure the highest level of PCI compliance throughout all applications

SedonaCloud/SedonaAPI 2.0 Setup - If your company uses the SedonaAPI, IT will update your SedonaAPI version at the same time as your SedonaOffice version. This is to ensure compatibility with the SalesAutomation module.

If you are not a SedonaCloud customer, please review the requirements for the new API before requesting the update. For a copy of pre-install requirements please contact: sedonaoffice.support@boldgroup.com

Performing Update - Once you have reviewed all of the above information, and followed all preparation steps, contact SedonaOffice support. We will note on your account that you have received the Release Notes and are ready for update. SedonaOffice IT will then contact you to schedule your update.

Supported Environments

Version Support

****SedonaCloud Users**** - If your company utilizes SedonaCloud in any manner (utilize Sales Automation, Time & Attendance, eForms, SedonaWeb 2.0, or the SedonaCloud API for integrations such as the Manitou integration), you will need to update your SedonaCloud to version 1.40.1.2 or higher when you update SedonaOffice to 6.2.0.5

Minimum System Requirements:

- Server is on Microsoft .Net 4.6.1

Features

SedonaOffice/WeSuite Integration - Custom Job Costing Bucket Support (Requires WeSuite)

Generally, companies will have multiple job costing 'buckets' that don't line up with the costing functions provided by the software such as labor and materials. An example of one of these buckets would be equipment rental. Due to the fact that we don't have any specific function in the software to specifically track equipment rental, users will utilize a custom job costing bucket to track those costs manually and separately from the rest of their costs.

We are providing users the ability to ensure that when each separate cost/charge is rolled up into one installation item on the SedonaOffice Job, any costs on the WeSuite Proposal specified as being associated with one of those buckets gets added to the proper buckets when the proposal is completed and turned into a Job in SedonaOffice.

Sales Automation - New Quick Quote Feature

- Allows the user to select existing lead, customer or create a new lead when only minimal information such as name, phone or email is provided.
- Streamlines the proposal creation for new leads by creating the new lead and proposal in one step.
- Allows for multiple 'What if' scenarios prior to committing the Quick Quote to a proposal. The user can change the Sales Package, quantities, and/or total labor hours. The totals on the Quick Quote immediately reflect the changes.
- New Question Toolbox with field types; Dropdown, Checkboxes, Multiple Choice, Text Input, Number Input, Multi-line Input are added as an option to the Sales Package. The user can customize the labels and options of each of the toolbox types. Adding Questions to the Sales Package allows the user to define specific questions to ask the prospect/customer to customize the Quick Quote based on the responses provided. The questions toolbox option types can be set to required to aid the user in gathering the information required by the organization to improve the quality of the quote.
- New Time Window allows the user to define a window of time to be defined on the Quick Quote to give the lead/customer an estimate of when the work can be planned to be performed.
- Map Code allows the user to use the address defined or use a custom code on the Quick Quote.

See Detailed Feature Documentation.

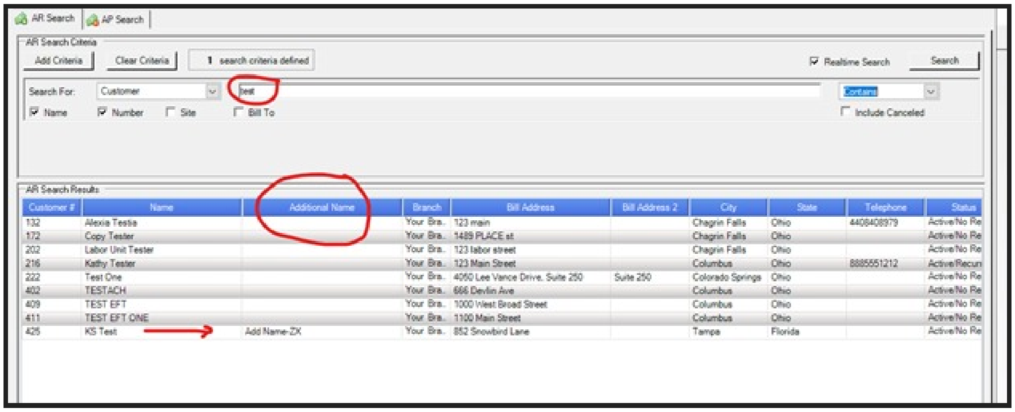
Enhancements

Added ability to Copy and Paste email address in Customer Billing Email Address Tab (22496, 23840) [4022]

New fields added to the bottom of the customer billing email address tab allow you to paste the email address and select whether the email is Primary, Invalid, or Inactive. The email address list at the top of the screen is now display only. You may select the row at the top of the screen and add or edit the fields displayed for that record at the bottom of the screen.

Added Additional Name column to the AR Search results in AR Search (23844) [Internal]

When using AR Search you can enter the data from the Customer's Additional Name field from Customer billing information into the search field and the AR search results will contain a column displaying the Additional name.



Created a Capture Transaction Endpoint (23716) [Internal]

This endpoint will be used by the SedonaCloud API to populate SedonaOffice with Forte payments.

Bugs

Note: Development ID is in parentheses ( ), Customer Case ID is in brackets [ ]

Payments by employee report missing some employees. (17763) [7532]

Issue: Cycle invoices were not showing the user who created the transaction.

Solution: Changed to display entered by information for Cycle Invoices on the payments by employee report. Note: Automated processing does not update the entered by field so those will still not show on the report.

A01 response code received, but there is no Deposit Check created in SedonaOffice. (18093) [13935, 15618, 20256]

Issue: EFT Processing not creating a deposit check for response code A01.

Solution: When posting a submitted EFT transaction, check for errors that causes the transaction to be rolled back. If an error occurs, change the transaction status to ORPHANED and log the error. The orphaned transaction will be reprocessed later.

Can add the same part multiple times to a job, but only one line pulls into the PO. (18125) [4263, 34963]

Issue: When the same part is on different lines on the materials tab for a job with the same location only one instance of the part is pulled into the PO.

Solution: Implemented check if there is no location mentioned and same part is entered twice on one phase then it display part twice in PO.

Costing does not transfer from WeSuite. (20292) [20370]

Issue: Costing does not transfer from WeSuite to SedonaOffice job costing when combing invoice items.

Solution: The cost was not transferring because it was mapped to the "default" cost. Mapped the SedonaOffice install cost to the cost as provided in the result set.

Type mismatch error on Sales Report. (20298) [Internal]

Issue: Clicking Ok button Sales Report returns a type mismatch error message.

Solution: Changed process for obtaining date from the combo box

OPT plugin button on bill to is not initializing. (20373) [20623]

Issue: OPT plugin button on bill to is not active.

Solution: The OPT button on the Customer Bill To Form did not work. Clicking the button now opens a browser to the web page in the OPT tables.

Query Builder Bill to Field will not populate correctly (20383) [20353]

Issue: Under Job Management Tab in Query Builder the "Bill Name" will not populate correctly. Rather than displaying the Bill To information, it displays the customer information.

Solution: Changed the join to select billing address.

Unable to save Canadian Addresses (20757) [14360]

Issue: Unable to save a different country address in Payment address while adding and updating vendor information.

Solution: Added a new column in A__Vendor table Pymt_Country_Id for payment address. Previously there was only one column for both addresses Country_Id. This allows you to save an address for the payment address with a different county than the vendor address.

Need verification added that account code is setup (21534) [5046]

Issue: Accounts posting with N/A Account code when Labor to GL is selected on Costing Tab in Job Type setup, but the Labor accounts are blank when Expense through WIP is checked.

Solution: Validation for Labor Expense, Labor Deferred and Labor WIP has been added.

Inspection record will not allow you to leave the tech field blank if there is a tech (21915) [19815, 22735, 4498, 4292]

Issue: The inspection record will not allow you to leave the tech field blank once you put a tech in there even though it is not a required field.

Solution: Sync Tech field property with 0 if it is unselected to allow inspection to be saved with a blank tech field.

SedonaEmail is invalidating emails (22488) [26703]

Issue: SedonaEmail is invalidating email addresses, seemingly at random and not consistently.

Solution: When Mandrill sends an email, it returns a status indicating whether or not it was delivered. The "Soft Bounce" status is one that indicates that the email could not be delivered at this time, but the email address is valid; subsequent attempts to send emails to this address may succeed. Added a check to ignore any emails that have a status of "Soft Bounce", since this could be a temporary condition.

Invoice error message received "3021 Either BOF or EOF is True, or the current record has been deleted. Requested operation requires a current record. (23039, 24832) [29500, 37232]

Issue: When users are on the invoice screen and save an invoice and look up a new customer they get an error message and then Sedona Office Crashes.

Solution: Resolved the issue causing the error message and subsequent crash when loading a new customer for a new invoice.

Advance deposits on job invoices are duplicating after being applied from one invoice to another. (22490) [27220]

Issue: Removing an advance deposit from a job invoice and applying it to a new invoice for that job causes a second application/removal of that advance deposit to the initial invoice along with GL activity.

Solution: Invoice2.Refresh and Account2.Refresh under save invoice fetches previous invoice's AR_Advance_Deposit_Details entries. So there is no need to calls these functions here.

Activity Ledger of credit transfer does not contain amount and balance information (22553, 24088, 25258) [4562, 4583]

Issue: Transfer amount and balance amount are showing 0.00 in activity ledger for Un-applied transfer amount from a customer.

Solution: Modified the Customer_Ledger stored procedure to pull in the transfer amount and balance amount.

Capture Authorized Forte Payments writes incorrect payment method to ar_ach (24494) [Internal]

Issue: Sent correct payment method for MasterCard through the API, but the ar_ach.payment_method_id is for the payment method in the EFT setup, which is American Express.

Solution: When saving an AR_ACH record for Forte payments, the payment method was being set to the default defined in the AR_ACH_Direct table, rather than the one specified by the PaymentInfo object. Modified the ACH_Add stored procedure to set the AR_ACH payment method to that specified by the payment method parameter.

WeSuite runtime error (24955) [36919, 38798, 38887, 39257, 39888]

Issue: Receiving runtime error when importing a job from WeSuite.

Solution: Certain functions were being called that were not needed. Changed code to only call those functions if not coming from WeSuite.

Cannot print a list of items on individual inspections. (26253) [41320]

Issue: Inspection report was not displaying the inspections.

Solution: Map the correct path when the report is getting generated.

Stored Procedures Updated:

WS_Account_Register - updated to support new Customer Registration in SedonaWeb.

ACH_Add - updated to set payment method based on payment method parameter.